

C A L I F O R N I A

Dairy Review

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In This Issue . . .

- 1** Water Quality Workshops Available
- 2** Production, Prices, Quota Transfers, Alfalfa
- 3** Vesicular Stomatitis Update
- 4** Nominations for MPSTF Board
- 4** USDA Annual Report Fluid Milk Consumption
- 4** California Bans Soda In High Schools
- 5** Hay Yields, Production Below Last Year Levels
- 6** New Unlawful Practices Regulations
- 6** National Dairy Situation & Outlook
- 6** Plea for Information on Dairying: 70 Years Ago
- 8** Pool and Mailbox Prices



California Department of Food and Agriculture
A.G. Kawamura, Secretary

Water Quality Workshops: October Workshops Still Available

Attention Central Valley Dairy Producers:

There were workshops held in September in Kern, Kings, Tulare, Madera, and Merced counties. October meetings are as follows:

Stanislaus County (3 workshops)

Thursday, October 6, 10:30 a.m. and 2 p.m., English/Portuguese language session at 7 p.m., Harvest Hall, Stanislaus County Agricultural Center, corner of Service and Crows Landing Roads, Modesto.

Glenn County (2 workshops)

Tuesday, October 11, 10:30 a.m. and 2 p.m., Kountry Kitchen, 729 4th Street, Orland.

Yolo/Sacramento (2 workshops)

Wednesday, October 12, 10:30 a.m., 2 p.m., Sacramento County Farm Bureau, 8970 Elk Grove Blvd., Elk Grove

These free and informational workshops are designed to help dairy producers complete the necessary forms for meeting the October 17, 2005 deadline for waste discharge reports. California Water Code Section 13620 authorizes the Regional Water Quality Control Boards to require Reports of Waste Discharge (ROWDs) from all dairy producers. If you own or operate a dairy in the Central Valley of California, this deadline applies to you. All dairy owners and operators must comply with this requirement.

Dairy producers/owners must submit a fee to the Regional Board along with their completed ROWD by the October 17 deadline.

Fees are:

- ◆ 3,000 or more mature cows (lactating and dry) = \$4,360
- ◆ 1,500 to 2,999 mature cows = \$2,725
- ◆ 700 to 1,499 mature cows = \$1,308
- ◆ 300 to 699 mature cows = \$654
- ◆ Less than 300 mature cows = \$327

CDQAP-certified dairy producers receive a 50% discount on these fees. Information on how to certify will be available at the workshop.



Production, Prices, Quota Transfers, Alfalfa

August Milk Production

Milk production in California for August 2005 totaled 3.15 billion pounds, up 2.5 percent from August 2004. USDA's estimate for U.S. milk production for August 2005 in the 23 major dairy states is 13.6 billion pounds, up 4.2 percent from August 2004. Production per cow in the 23 major states averaged 1,665 pounds for August, 64 pounds more than August 2004. ☀

Minimum Class Prices

Statewide average hundredweight prices

Class	August	September	October
1	\$15.97	\$15.35	\$15.69
2	\$13.27	\$13.27	N/A
3	\$13.11	\$13.11	N/A
4a	\$13.06	N/A	N/A
4b	\$12.99	N/A	N/A

Federal Order and California Minimum Class 1 Prices

Average Hundredweight Prices

Regions	August	Sept	October
Phoenix, Arizona	\$16.79	\$16.05	N/A
Southern California	\$16.11	\$15.49	\$15.83
Portland, Oregon	\$16.34	\$15.60	N/A
Northern California	\$15.84	\$15.22	\$15.56
Boston (Northeast)	\$17.69	\$16.95	N/A

Quota Transfer Summary

For August 2005, four dairy producers transferred 4,337 pounds of SNF quota. August quota sales averaged \$486 per pound of SNF (without cows), average ratio of 2.40. For September 2005, six dairy producers transferred 5,515 pounds of SNF quota. September quota sales averaged \$470 per pound of SNF (without cows), average ratio of 2.44. ☀

Alfalfa Update: September

Northern California: Supreme and Premium alfalfa was steady to firm, with good demand and light supplies. Fair and Good alfalfa was steady with moderate demand and light to moderate supplies. Retail and Stable hay was steady with moderate supplies with many producers putting supplies in the barn for winter take out. Weather is turning cooler.

Southern California: Premium and Supreme alfalfa not well tested with very light supplies. Fair and Good alfalfa was steady with light supplies. Some are contracting for this grade hay. Retail and stable hay was steady to firm with moderate demand. Weather is cooler than previous weeks and quality of hay should start improving. ☀

Supreme Hay Prices

Statewide average prices per ton

Area	8/26	9/2	9/9	9/17
Petaluma	N/A	N/A	N/A	\$190
North Valley ¹	\$190-215	\$195-217	\$190-215	\$195-210
South Valley ²	\$208-210	N/A	\$207-215	\$207-207
Chino Valley	N/A	N/A	\$180-187	N/A

¹ North Valley is Escalon, Modesto and Turlock areas.

² South Valley is Tulare, Visalia and Hanford areas.

Alfalfa Hay Sales/Delivery

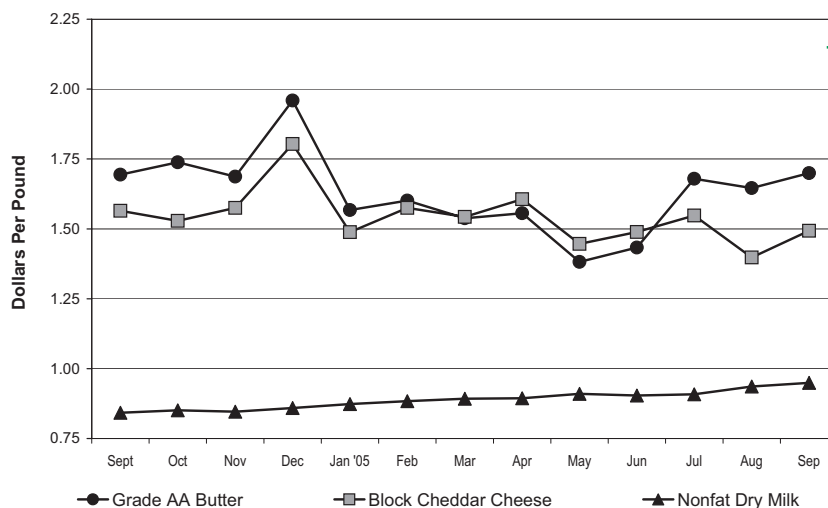
	August	September
Tons Sold ¹	227,255	208,071
Tons Delivered ²	105,265	90,021

¹ For current or future delivery.

² Contracted or current sales.

Alfalfa hay sales, deliveries and Supreme quality prices per ton, delivered to dairies, as reported by the USDA Market News Service, Moses Lake, WA, (509) 765-3611, <http://www.ams.usda.gov/marketnews.htm>

Grade AA Butter, Block Cheddar Cheese, and Nonfat Dry Milk Prices Used in the Calculation of California Class 1 Milk Prices





Vesicular Stomatitis

Vesicular Stomatitis (VS) is a viral disease that primarily affects cattle, horses, and swine. The virus that causes VS has a wide host range including deer, raccoons and monkeys. Humans handling infected animals can develop flu-like symptoms.

VS is most likely to occur during the warm summer months, particularly along riverways and in the valleys.

The VS blister-like lesions seen in swine, cattle, and cloven-hooved animals mimics Foot and Mouth Disease (FMD), a foreign animal disease eradicated from the U.S. in 1929. However, FMD can be eliminated as the cause if horses are seen with lesions, as FMD does not cause blister-like lesions in horses.

REMINDER: FMD and VS are clinically indistinguishable in Cattle.

Sampling and rapid diagnosis are essential when the lesions are observed in cattle and other cloven-hooved animals. Currently, there is no specific treatment for animals infected with VS and no vaccinations available for prevention of this disease.

How VS is Spread

After the first VS diagnosis in the herd, animal-to-animal contact or biting insects may spread the disease throughout the herd. An infected animal's saliva or fluid from the ruptured blister can contaminate feed, water, or hay to further spread the disease.

Clinical Signs

Affected livestock infected with VS usually show clinical signs 2-8 days after first exposure to the virus. The virus causes blister-like lesions that can be extremely painful as they swell and rupture.

The first noticeable sign is usually excessive salivation due to the blister-like lesions of the mouth, dental pad, lips or tongue. Blisters can also be found on the nostril, hooves and teats. Animals generally refuse to eat or drink and can show signs of lameness.

What to do if You Suspect VS

If you suspect your horse or livestock have VS, notify the California Department of Food and Agriculture, Animal Health Branch or United States Department of Agriculture (USDA) office in your area. Diagnosis of VS cannot be made based on clinical signs. Sampling and laboratory testing is crucial to differentiate from other diseases such as FMD. Samples are tested at the USDA National Veterinary Service Laboratory (NVSL) in Ames, Iowa.



For more information visit <http://www.aphis.usda.gov/vs/ceah/ncahs/nsu/surveillance/vsv/vsv.htm>

US Outbreak

On April 27, 2005, the NVSL in Ames, IA, confirmed the finding of VS in horses in New Mexico. This was the first confirmed case in the U.S. in 2005.

Since April, VS has been found in over 300 premises that have been quarantined. During this time the disease has spread through seven states, including Arizona, Colorado, Montana, New Mexico, Texas, Utah and Wyoming. Over 400 horses and 100 cattle have tested positive for VS. As of September, Arizona and Texas have no premises under quarantine for VS.

Prevention Strategies for VS

Even with the best defensive measures VS can still infect your herd. The following are ways to help protect horses and livestock:

- Implement on-farm insect control programs
- Keep horses stalled at night to reduce biting insect exposure
- Use individual buckets for animals
- Disinfect equipment
- Separate animals with lesions from healthy animals

California Movement Restrictions

California import requirements specify that all horses, cattle, and swine originating from any state where VS has been diagnosed since April 2005, (except cattle and swine transported directly to slaughter) must be accompanied by a health certificate (certificate of veterinary inspection), and signed by an accredited veterinarian. All certificates must include the following statement:

"The animals represented on this health certificate of veterinary inspection have not originated from a premises or area under quarantine for Vesicular Stomatitis (VS) or a premises on which VS has been diagnosed in the past 30 days. I have examined the animals and have found no signs of VS."

In addition, the California Horse Racing Board (CHRB) requires any horse traveling to a racetrack and/or CHRB training center in California to have a negative test for VS within the previous 30 days. Questions regarding movement to and from CHRB facilities should be directed to Dr. Ron Jensen, CHRB Equine Medical Director, at (916) 263-6000.

CDFA Animal Health Branch Offices	
Sacramento (HQ)	916-654-1447
Modesto	209-491-9350
Ontario	909-947-4462
Redding	530-225-2140
Tulare	559-685-3500
USDA/APHIS/VS 916-857-6170 or 877-741-3690	

Secretary Seeks Nominations for Three Positions on Milk Producers Security Trust Fund Board

The Department is seeking nominations to fill three positions on the Milk Producers Security Trust Fund Board of Directors that have terms expiring at the end of 2005. There will be one member position representing producers, one member position representing processors and one member position representing cooperative management that will need appointments for a three-year term of office. The terms will begin on January 1, 2006, and expire December 31, 2008.

The current members with terms that expire at the end of the year are:


- Richard Cotta, California Dairies, Inc. – Representing Cooperative Management
- Bill Van Leeuwen, Mid-Hill Dairy – Representing Producers
- Sharon Hale, Crystal Cream & Butter Company – Representing Processors

The Milk Producers Security Trust Fund Law provides that members can serve no more than three consecutive terms of office on the Board. Richard Cotta and Bill Van Leeuwen will be completing their third term of office on the Board and are not eligible for reappointment. Sharon Hale is completing her first term of office and is eligible to be renominated for the Processor Representative position.

In addition to the three vacancies above, an additional vacancy for a Producer Representative exists caused by the resignation of Joe Pimentel from Tracy. The Department is also seeking nominations to fill this vacancy, the term of office for this position ends on Dec. 31, 2006.

The Board of Directors holds two regularly scheduled meetings each year; one is held in March and the other in September. When necessary, the Board may hold special meetings should there be a significant payment default by a processor that results in producer claims against the Trust Fund. Meetings typically run two-to-three hours.

Persons interested in serving on the Board, or interested in nominating someone to serve on the Board should submit a letter to Secretary A.G. Kawamura, Secretary of Food and Agriculture, c/o The Milk Pooling Branch, 1220 N Street, Sacramento, California 95814. To be eligible for appointment, the nominee must serve currently in the capacity of a dairy producer, cooperative management, or processor. Nomination Letters must be post-marked no later than November 15, 2005.

If you are considering nominating someone other than yourself for one of the three positions, please contact that person in advance and confirm their willingness to serve on the Board. Questions regarding the nomination process may be directed to Bob Maxie at (916) 341-5901 or by email at bmaxie@cdfa.ca.gov. 


USDA Annual Report on Fluid Milk Consumption

USDA reports that fluid milk consumption continues to decline, however their annual report to Congress cited that consumption figures would be even lower if not for the producer-funded National Dairy Promotion and Research Program and the processor-funded National Fluid Milk Processor Promotion Programs. The report states that these dairy marketing efforts had a positive and statistically significant impact on dairy consumption for the period 1990-2004.

The report identified several factors influencing the steady decline in per capita fluid milk demand since 1995:


- aggressive advertising and marketing by competitive beverages, especially bottled water,
- percentage of U.S. population under age 6, one of the largest milk-consuming groups. This age group declined between 1995-2000 and has since flattened out,
- expenditures on food consumed away from home as a percentage of total food expenditures has increased: less food consumed at home tends to reduce milk consumption.

The study indicates that the producer- and processor-funded promotion programs helped market an additional 5.4 billion lbs. of milk per year from 1995-2004. The report also states that from 2000-2004, each \$1 spent on generic dairy marketing returned \$5.11 in net revenue to producers.

The report is posted in its entirety on the USDA Agricultural Marketing Service website at: www.ams.usda.gov/dairy/dairyrp.htm. 

California Bans Soda in High Schools

Governor Arnold Schwarzenegger signed legislation that prohibits the sale of carbonated soft drinks in California's high schools. The ban, which already exists in the state's elementary schools, is part of an effort to reduce obesity among children in California.

The new law permits the sale of milk, unsweetened water and drinks that contain at least 50 percent fruit or vegetable juice. It will be phased in starting in 2007 and be fully implemented in 2009. The ban is expected to cost California school districts hundreds of thousands of dollars in lost income from the sale of soda. 

Hay Yields, Production Below Last Year Levels

By Seth Hoyt, USDA National Agricultural Statistics Service, California Field Office

Alfalfa hay yields in California through August 2005 were running 6% below the previous year and the lowest yields since 1998. A late start to the season and challenges with spring rain took a toll on yields and production. This trend was also reflected in the seven Western States and in the U.S., both down 2% in production through August. U.S. alfalfa hay yields were running 4% lower than last year. Idaho, the second leading alfalfa hay producing state in the West was down 2% on yields and production.

Dry Cow Alfalfa Prices

The alfalfa hay market is reflecting the lower yields and production. Premium and Supreme alfalfa hay delivered to Tulare dairies continues to trade from \$180.00 to \$220.00 per ton. Fair quality alfalfa hay is delivering mainly from \$140.00 to \$150.00.

While it appeared that rain damaged alfalfa and other hay, along with silage and other by-product feeds could be bearish to the dry cow alfalfa hay market, this hasn't happened. Fair quality alfalfa hay prices, after a brief weak period in late June, have held steady-to-firm through July and mid-August. What is more amazing is that many growers at mid-season were cutting on longer cycles to produce tonnage. Depending on the length of the season, this could raise yields above 6.80 tons for the year. But it will take quite a surge the second half of the season to make up for the lower yields of the first half. With very hot weather in July, and a strong fair quality alfalfa market, there was no incentive for valley growers to cut on shorter cycles to try to produce higher quality hay.

The light supplies and strong demand for alfalfa hay are reflected in shipments from other states. Alfalfa hay trucked into California in June totaled 63,309 tons, up 48% from June of last year, the highest crossings for June since 2002. Utah shipments continued to be up sharply from 2004. In the first six months of 2005, alfalfa hay moving into California from Western states totaled nearly 419,000 tons, up 28% from the same period last year. This appears to be a record amount of alfalfa hay trucked into California for the first half of the year.

Fuel Price Factor

With light supplies of alfalfa hay in California and strong demand, one would think alfalfa hay shipments would be strong the second half of 2005. However, a big negative is escalating freight costs due to the unprecedented rise in diesel fuel prices. The positive for growers is that

many dairy producers need alfalfa hay to carry them through the winter, particularly high quality hay.

Cow Numbers

While the number of milk cows (including dry cows) in California in July were up 31,000 from a year ago at 1,760,000 head, the average monthly growth of 2,600 head is down from 2004. In July of last year, there were 38,000 more cows than the previous year with a monthly average growth of around 3,200 head. It is interesting that Idaho's dairy cow numbers in July were up 32,000 from a year ago. The amazing thing about this is in July of last year Idaho milk cow numbers were up only 14,000 from the previous year. Milk production in Idaho in July was up 13.4% from a year ago, compared to California's 1.5% increase.



Hot weather in July and a shortage of high test alfalfa hay had a huge impact on milk production in California. Milk per cow dropped 5 pounds (per day) compared to a year ago, while milk production per head in Idaho was up a whopping 100 pounds.

Growth Factors

Two factors affecting slower growth of milk cow numbers in California were fewer milk replacement heifers shipping into California from other states and the Cooperatives Working Together (CWT) program. In the first five months of 2005, 54,049 dairy replacement heifers were trucked into California. This is 26% below the 72,872 head in the same period last year. It appears that strong competition from buyers in other states was the main reason for the drop in shipments. The third CWT Herd Retirement program began on August 15 with the goal to remove 70,000 cows from U.S. dairy herds.

Chino Basin Dairies

Another development that could impact future dairy cow numbers in California is the movement of dairies from the Chino basin to other states. One dairy producer in Chino told me a few weeks ago that he was considering moving to the Texas Panhandle and knew of others

Continued next page


Hay Yields - Continued

who were also considering that area. As the movement of dairies from Chino accelerates over the next few years, it will be interesting to see how many actually move out of California.

I've heard that some growers are moving alfalfa hay to barns for the winter. While much of this is non-test hay (less than milk cow quality), it reflects the grower attitudes that the winter hay market will be bullish. It has all the elements to be a strong winter hay market. We are in a situation where alfalfa hay demand is outpacing supplies. Unless alfalfa hay production the second half of the 2005 season makes a sharp upward move, we will probably go into winter with lower hay stocks.


Looking Ahead

I'm hearing some rumblings that cotton growers in the San Joaquin Valley who grow alfalfa hay will increase hay acres in 2006. It would make sense that cotton acres would be switched to alfalfa hay considering the pressures on the U.S. cotton support program and the record high alfalfa hay market. It would be very surprising if alfalfa hay acres didn't go up in California next year.

While some alfalfa acres have gone into permanent crops in recent years, such as almonds, one has to believe that with these kind of hay prices, growers will find a way to plant more alfalfa. From a practical standpoint, hay acres need to increase to service the large number of dairy cows in California, the alfalfa hay industry's main consumer. 

New Regulations on Unlawful Practices

Revised regulations governing dairy marketing practices have recently completed the state's administrative process and are now effective. These regulations now conform to the Unlawful Practices laws in the Food and Agricultural Code, which was amended by legislation in 2000 (SB 1381, Ch. 164). Both the amended laws and regulations lessen the restrictions on the promotion of dairy products, and clarify the prohibition against selling dairy products below cost. The new regulations also clarify how costs are to be computed by manufacturers and wholesalers, and the process the Department will use to make determinations on allegations of selling dairy products below cost.

These regulations are the result of several years' effort, which included public input, the participation of various dairy industry stakeholders, private consultants, and dairy trade organizations. They were adopted only after successfully undergoing the public notification and public comment process. 

National Dairy Situation and Outlook – USDA Estimates

Milk Production and Cow Numbers


Monthly: Compared to 2004, USDA estimates that overall milk production across the U.S. was up 4.3% in August, led by Idaho's 13.4% growth in milk production (on 30,000 more cows and 90 more pounds per cow). California's estimated production was up 2.6% (on 30,000 more cows and 15 more pounds per cow). Among the western states, Arizona was up 2.9%; New Mexico up 6.2%; and Washington up 6.9%. None of the top 10 states reported a production decrease.

Quarterly: For the second quarter of 2005 compared to the first quarter of 2005, U.S. milk cow numbers were up 0.4% at 9.035 million, production per cow was up 5.1%; the net effect was a 5.8% increase in milk production to 45.7 billion pounds. USDA projects that for the third quarter of 2005 compared to the second quarter of 2005, U.S. milk cow numbers will increase 25,000 cows to 9.060 million cows, production per cow will be down 4.6%; the net effect would be a 4.4% decrease in milk production to 43.7 billion pounds.

Milk Prices

Comparing the second quarter of 2005 to the first quarter of 2005, U.S. average milk prices were down \$0.80/cwt. to \$14.83/cwt. USDA projects that for the third quarter of 2005 compared to the second quarter, U.S. average all-milk prices will be \$14.65-14.85/cwt.; Class 4b prices will be \$13.80-14.00/cwt; and Class 4a prices will be \$13.20-13.50/cwt.

Utility Cow Prices

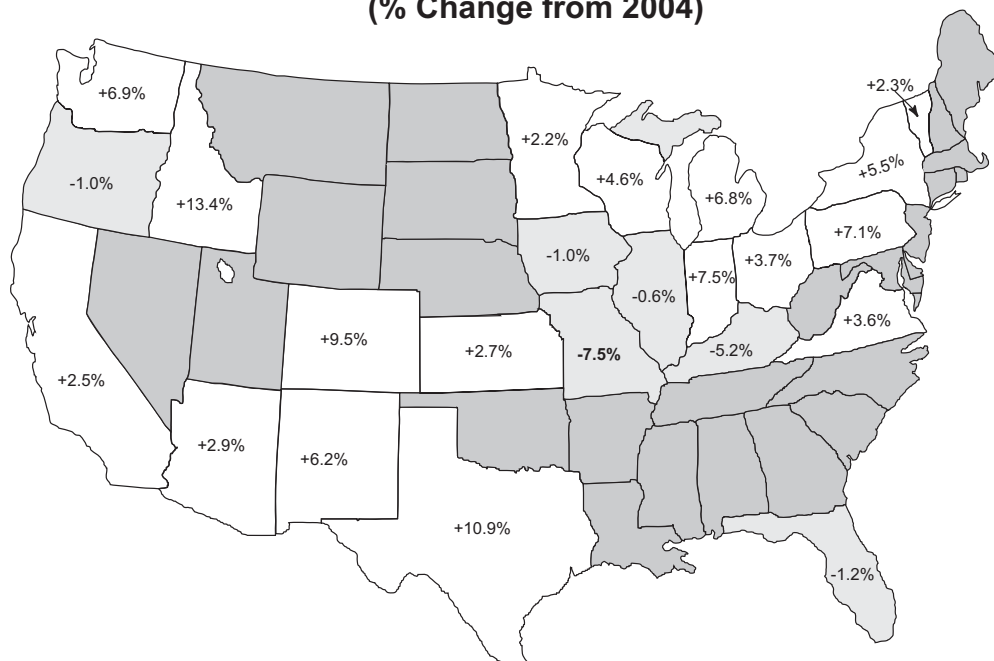
Comparing the second quarter of 2005 to the first quarter of 2005, average U.S. utility cow prices were up \$5.00/cwt. to a national average of \$59.17/cwt. USDA projects that utility cow prices will average \$55-56 in the third quarter of 2005. 

70 Years Ago . . .

We're Looking for Information:

The Dairy Marketing Branch is looking for any information on what the California dairy industry was like 70 years ago. Do you have any photos, stories to tell, documents/booklets which might portray what dairying was all about in the 1930's-40's, etc.? Any friends or relatives that might have information? We'd love to hear from you. Call Karen Dapper or Candace Gates at (916) 341-5988 or email the dairy website at: dairy@cdfa.ca.gov.

August Milk Production in the Top 23 States (% Change from 2004)



For the U.S. overall, comparing August 2005 to August 2004:

- Milk production during August was up 4.3%
- The number of cows on farms was 9.074 million head, up 45,000 head
- Production per cow averaged 1,634 pounds, 55 pounds more than August 2004
- Seventeen of the top twenty-three milk producing states showed an increase in milk production

As reported by USDA
and CDFA (for California)

Milk Production Cost Comparison Summary for California ^{1/} By Month, January 2004-December 2005

Month	North Coast		North Valley		South Valley		Southern California		Statewide Weighted Average	
	2004	2005	2004	2005	2004	2005	2004	2005	2004	2005
<i>Dollars per Hundredweight</i>										
January	15.45	15.33	13.82	13.37	12.19	13.14	12.82	13.82	12.98	13.36
February	15.81	15.55	13.61	13.72	12.47	13.50	12.96	13.93	13.06	13.69
March	14.37	14.86	13.16	12.99	12.24	12.70	13.08	13.16	12.77	12.92
April	13.77	14.68	13.27	13.16	12.50	13.03	13.07	12.95	12.91	13.12
May	13.44	13.96	13.23	13.02	12.76	12.99	13.35	12.93	13.04	13.02
June	13.70	14.04	13.45	13.41	13.09	13.02	13.63	13.21	13.32	13.22
July	13.66		13.03		12.83		13.41		13.01	
August	14.16		13.00		12.82		13.48		13.03	
September	14.33		13.44		13.11		13.56		13.34	
October	14.22		13.43		13.08		13.38		13.29	
November	15.25		13.91		13.43		14.17		13.77	
December	15.17		13.71		13.26		13.96		13.59	

^{1/} Cost Comparison Summary data includes an allowance for management and a return on investment.

Hundredweight Pool Prices

Month	Quota	Overbase
February '04	\$13.32	\$11.62
March	\$15.44	\$13.74
April	\$18.23	\$16.53
May	\$18.69	\$16.99
June	\$17.46	\$15.76
July	\$15.03	\$13.33
August	\$14.74	\$13.04
September	\$15.21	\$13.51
October	\$14.81	\$13.11
November	\$15.74	\$14.04
December	\$15.74	\$14.04
January '05	\$15.50	\$13.80
February	\$14.96	\$13.26
March	\$14.98	\$13.28
April	\$15.06	\$13.36
May	\$14.60	\$12.90
June	\$14.56	\$12.86
July	\$14.99	\$13.29
August	\$14.65	\$12.95

Milk Mailbox Prices

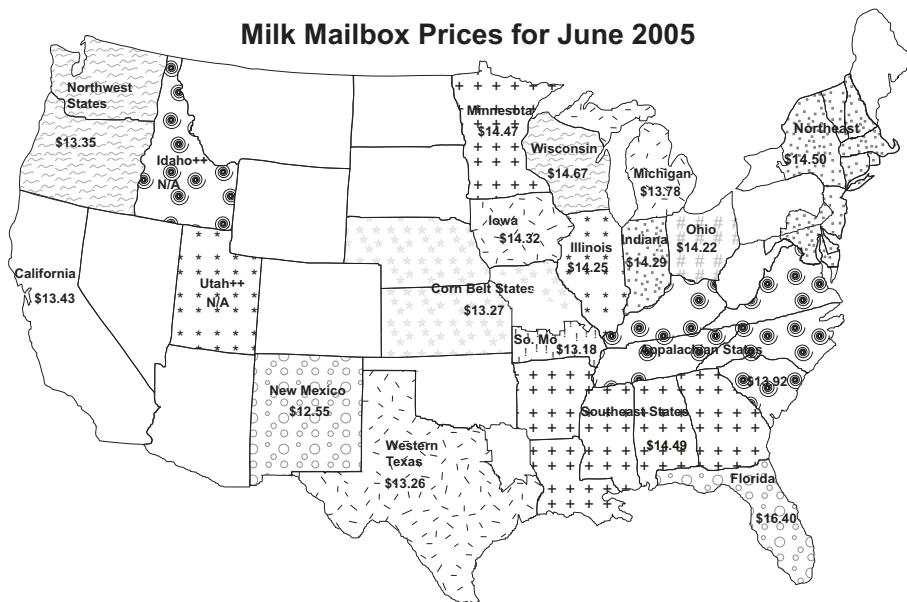
Milk Mailbox Prices in Dollars per Hundredweight

	December	January	February	March	April	May	June
California ¹	\$15.18	\$14.85	\$14.16	\$13.99	\$14.11	\$13.48	\$13.43
USDA ²	\$16.38	\$15.89	\$15.24	\$15.46	\$14.97	\$14.48	\$14.13

¹ California mailbox price calculated by CDFA.

² All federal milk market order weighted average, as calculated by USDA.

Milk Mailbox Prices for June 2005



In June 2005, mailbox prices for selected reporting areas in Federal milk orders averaged \$14.13 per cwt., \$0.35 less than the figure for the previous month. The component tests of producer milk in June 2005 were: butterfat, 3.54%; protein, 2.93%; and other solids 5.73%. On an individual reporting area basis, mailbox prices decreased in all reporting areas except one, ranging from \$16.40 in Florida to \$12.55 in New Mexico. In June 2004, the Federal milk order all area average mailbox price was \$18.26, \$4.13 higher.

**Mailbox prices for Idaho and Utah are being discontinued due to the termination of the Western Federal Order.

In accordance with the California Government Code and ADA requirements, this publication can be made available in an alternative format by contacting Karen Dapper at (916) 341-5988, by email at dairy@cdfa.ca.gov, or contacting TDD 1-800-735-0193.

Dairy Marketing Branch:
Phone (916) 341-5988; Fax (916) 341-6697
Website: www.cdfa.ca.gov/dairy
Email: dairy@cdfa.ca.gov

Milk Pricing Information:
Within California 1-800-503-3490
Outside California 1-916-442-MILK

The California Department of Food and Agriculture Dairy Marketing Branch publishes the California Dairy Review monthly. Please direct any comments or subscription requests to Karen Dapper at (916) 341-5988 or send an email to dairy@cdfa.ca.gov

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